

Acquisitions Technical Group Meeting Packet

March 16, 2022

Staff Report – Rachel Fischer

- **7.1 Upgrade:** The training server has been upgraded to Polaris 7.1. Information on the new features can be found in the [What's New in Polaris and Leap 7.1](#) document. New features in Polaris 7.1 include:
 - Printing spine labels in Leap
 - Viewing and editing serials holdings records in Leap
 - Creating fiscal year records, fund records, and supplier records in Leap
 - Ordering and invoicing functionality for EDI orders in Leap

I have begun working on the Acquisitions in Leap online course and will lead two Acquisitions in Leap webinars in mid-April. One session will focus on the set-up tasks, including creating fiscal year records, fund records, and supplier records. The second session will focus on the EDI workflow for ordering and invoicing. We still have not received information on the acquisitions API setup yet.

Register for the courses on L2:

- [Acquisitions in Leap: Set Up Tasks](#) – April 19 at 1 PM
 - [Acquisitions in Leap: EDI Workflow](#) – April 26 at 1 PM
- **New and Updated Documentation:** Here is a list of new and updated documentation that you should review.

New Documentation:

[Supplier Records](#) – This is a document on creating supplier records in the Client.

Updated Documentation:

[Invoice Charges, Credits, & Discounts](#) – Instructions were added for crediting the full invoice and the full amount of a line item. A cautionary note was added to the beginning of the page.

[Canceling a Purchase Order](#) – Instructions were revised to add details on handling holds that will need to be canceled.

Links for resources to review

- [Canceled Publications Procedures](#)
- [Fiscal Year Rollover](#)
- [Correcting Uninvoiced Purchase Orders](#)
- [On Order Record Standards](#)
- [Crediting Invoices](#)
- [What to do if you have questions](#)